

PHYTASE IN ANIMAL FEED

STRATEGIES TO GROW YOUR BUSINESS

Prepared by:

CPL Business Consultants

Milton Park Innovation Centre, Abingdon, OX14 4RY, United Kingdom
Tel: +44 1865 257 252, info@cplconsult.com, www.cplconsult.com

TABLE OF CONTENTS

| | |
|--|----------|
| PHYTASE IN ANIMAL FEED | 1 |
| <i>Method</i> | 1 |
| PHYTASE IN ANIMAL FEED..... | 2 |
| <i>Executive Summary</i> | 2 |
| <i>Survey results</i> | 2 |
| <i>Phytase and Other Enzymes used in Animal Feed</i> | 2 |
| <i>Trends in Animal Feed Markets</i> | 2 |
| <i>Markets and Trends in Animal Feed Additives</i> | 3 |
| <i>Trends in Enzyme Additives in Animal Feed Markets</i> | 3 |
| <i>Markets and Trends for Phytase Feed Additives</i> | 3 |
| <i>Phytase Feed Additive Players and Products</i> | 3 |
| <i>Geographic Phytase Use</i> | 3 |
| <i>Phytase Feed Additive Use by Species</i> | 3 |
| <i>Market Drivers and Restraints</i> | 4 |
| <i>Academic Research e.g.</i> | 4 |
| <i>Technical Developments e.g.</i> | 4 |
| <i>Animal Feed Industry Supply and Value Chain for Phytase</i> | 4 |
| <i>Premixers, Feed Compounders and Integrators</i> | 4 |
| <i>Customer Survey Results</i> | 5 |
| <i>Contact Reports</i> | 5 |

In this case study, CPL Business Consultants was engaged by a global ingredients company to obtain insights into the perceptions of phytase products in the animal feed additives market. The client had a phytase product on the market and wanted an independent view of its market position. The client used this information to inform its marketing strategy.

The purpose of this project was to obtain information on the phytase feed additives market and an understanding of the value chain, including views of pre-mixers. The initial phase was to construct the survey form and format. After this, variants on the basic survey were devised that were appropriate for compounders, pre-mixers and integrators.

Method

CPL developed a methodology which could be used for other products and markets addressed by the client. During the course of the project, around 70 respondents were identified and asked to complete the survey. Each potential respondent was approached, or a company was approached and asked to identify suitable personnel. Each request was followed up with emails and phone calls.

Contacts were made with a cross-section of representatives of the industry, including enzyme manufacturers, pre-pre-mixers, pre-mixers, compounders, integrators and academics. Some of these were visits, some telephone and/or email dialogues. All the contacts were asked for assistance. The main focus of the effort was to gather information and understand the markets and value chain without ever actually addressing these questions too directly.

During the project, data was collected from various sources, including the surveys. In the report, we presented the material collected and analysed its meaning. Information collected during the study about the more general aspects of animal feed additives, enzymes, etc., was also included in order to put the more specific findings into context.

Click here for a PDF of [the contents of the study](#), or otherwise, look below for an outline.

The contents of the study included:

PHYTASE IN ANIMAL FEED

Executive Summary

- Objective
- Method
- Principal Findings and Conclusions
 - Animal Feed Ingredients
 - Animal Feed Additives
 - Animal Feed Enzyme Additives
 - Phytase as an Enzyme Additive

Survey results

- Answers to Some Specific Questions
 - Perception of Different Enzyme Products
 - Final User Price
 - The Intermediate Margins
 - Price of Phytase

Phytase and Other Enzymes used in Animal Feed

- Feed Enzymes, Functions and Applications
- Phytase Function and Applications
 - Feed Substrates, Phosphorous Content and Digestibility
- Feed Enzyme and other Feed Additives Regulations

Trends in Animal Feed Markets

- Raw Materials Used in Compound Feed in the EU
- Feed Enzyme Market Concentration
- Compound Feed Production by Geography
- Compound Feed Production by Species

Markets and Trends in Animal Feed Additives

- Feed Additives Market Value and Volume
- Price of Animal Feed Additives
- Competition and Industry Concentration
- Feed Additives Used in the EU
- Industry Challenges
 - e.g. Capacity, Pricing, Regulations
- Market Drivers and Restraints
 - e.g. Consumer Trends, Regulations
- Additive Production by Country
- Animal Production by Type in Europe

Trends in Enzyme Additives in Animal Feed Markets

- Market Value and Volume
- Price Development
- Intensity of Competition
- Feed Enzyme Product Types
- Market Drivers and Restraints

Markets and Trends for Phytase Feed Additives

- Market Value, Volume and Growth
- Price and Price Development
- Competition
 - Phytase Market Players
 - Reputations and Product Differentiation
- Product Types

Phytase Feed Additive Players and Products

- Detailed company profiles
 - e.g. products, technologies, service, people, reputation

Geographic Phytase Use

- Europe
- US

Phytase Feed Additive Use by Species

- Pigs
- Poultry

Market Drivers and Restraints

- Current/Future Drivers
- Current/Future Restraints

Academic Research *e.g.*

- Enzyme Activity Phosphate Replacement
- Environmental Effects
- Cost/Benefit Analyses

Technical Developments *e.g.*

- Animal Genetics
- Combination Products
- Enzyme Activity and Stability

Animal Feed Industry Supply and Value Chain for Phytase

- Enzyme Additive Supply Chain Structure
 - Value Chain Assessment
 - Enzyme Producers
 - Enzyme Marketeers
 - Premixers
 - Feed Compounders
 - Integrators
 - Other End Users
- Enzyme Producers
 - General Overview of Enzyme Producers

Premixers, Feed Compounders and Integrators

- General Overview from Contacts

Customer Survey Results

- Overview
 - Combined results
 - Premixers
 - Compounders
 - Integrators
- Combined Survey Results
- - Premixers/Blenders Survey Results
 - List of Participants
 - Animal Feed Compounder Survey Results
 - List of Participants
 - Integrators Survey Results
 - List of Participants

Contact Reports

- Academics and Researchers in Animal Nutrition e.g.
 - National Institute for Animal Science
 - University of Nebraska Extension
 - [University of Northern Illinois](#)
 - University of Virginia
- Commercial Contacts in Animal Nutrition e.g.
 - Animal Feed Enzyme Producers
 - Animal Feed Premixers/Blenders
 - Animal Feed Compounders/Integrators
 - Other Experts in Animal Health and Nutrition

In addition to this report on phytase, CPL has worked on a very wide range of topics in the animal feed additives market. You can find further relevant examples using the search bar on this page, or by browsing this site by areas of expertise. Have a look at our [Introduction](#) and [Brochure](#) for a description of our consultancy work. You can also review [eight case studies](#).